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MARKETING & MEDIA

Decisions

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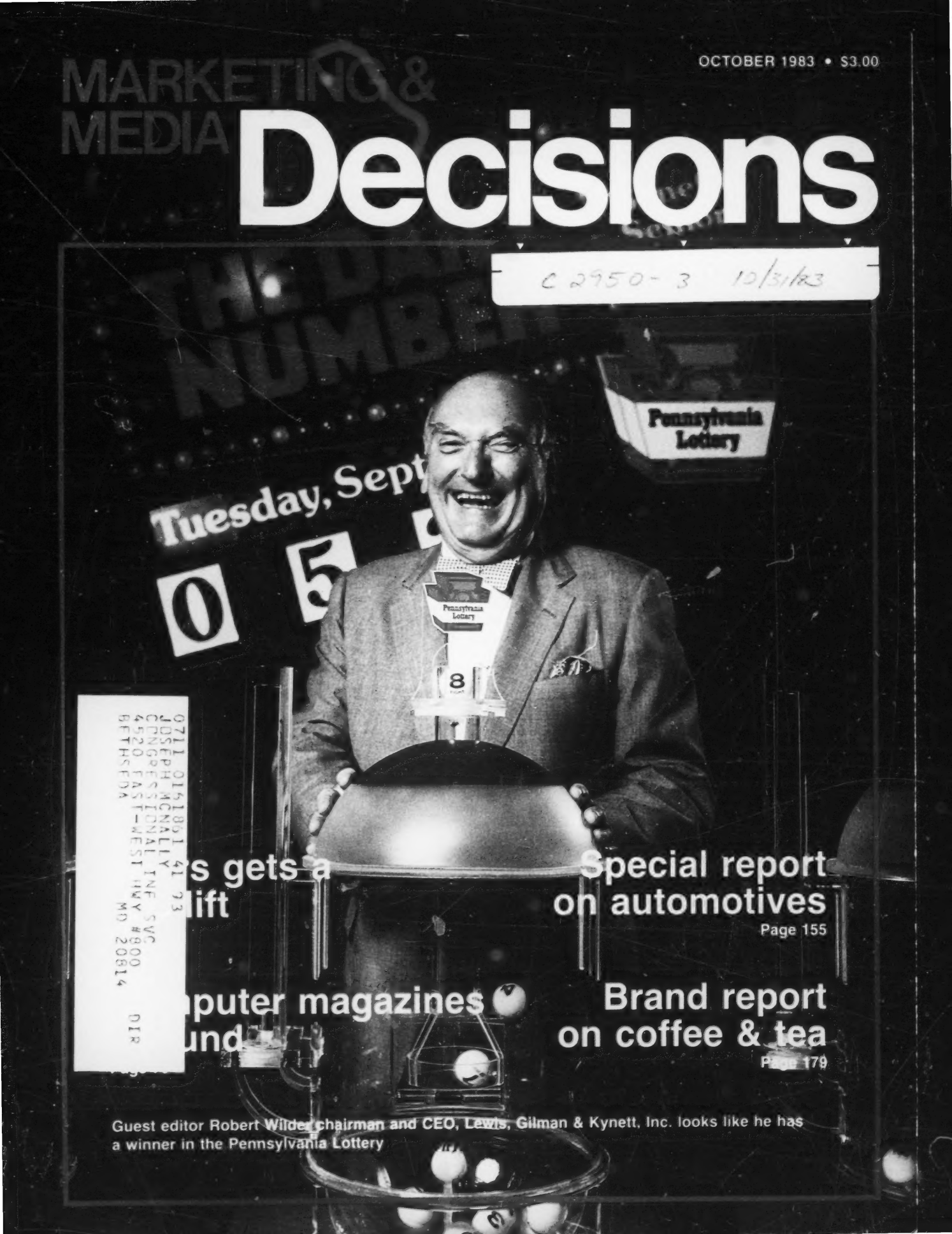


0711 0141861 41 23
JOSEPH MCNALLY
CONGRESSIONAL INF SVC
4520 EAST-WEST HWY #900
BETHESDA MD 20814

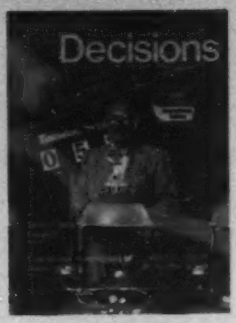
s gets a
lift

Special report
on automotives
Page 155

puter magazines
und

Brand report
on coffee & tea
Page 179

Guest editor Robert Wilder, chairman and CEO, Lewis, Gilman & Kynett, Inc. looks like he has a winner in the Pennsylvania Lottery



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More numbers on NEM growth

A recently released report conducted by Predicasts, a market research firm, found that U.S. consumers will continue to be interested in videotex and teletext. Predicasts sees the $118 million revenues of 1982 ballooning to $11.5 billion by the mid-1990's.

Possible barriers to potential growth cited in the report include the lack of a common system standard, of fully developed products and services, and, increasingly with penetration, the future form and direction of pricing structures of service fees. Subscriber fees are expected to drop as the consumer base increases. But since current systems tend to be informational, rather than transactional, prices may eventually be spread over a wide range.

The report found that the in-home market shows the greatest potential for growth, even though business use of videotex systems is expected to fuel short-term expansion.

Teletext is expected to become even more prevalent than videotex, primarily because it is cheaper and easier to use. By 1995, the report predicts, two-thirds of all U.S. households will be equipped to receive transmission, adding up to a $1.6 billion market.

A second report, released by Media Science Reports, sees the past four years of the "NEM Revolution" as the prelude to a massive change, to take place within the next four.

NEM, the report predicts, "will roll out to 7 out of 10 households, with the average NEM household to have access to 3.2 NEM types." Technology involved in the description ranges from pay tv, video games and video cassettes, to advanced computers.

Media Science Reports interprets these "tv-behavior changers" as posing a threat to tv advertising effectiveness, stating, "By 1987, there will be effective barricades against forms of tv advertising in 7 out of 10 households."

U.S. Videotex & Teletext Markets

ITEM	1977	1982	1987	1995	% Annual Growth 1977/82	1982/87	1987/95
GNP (bil $)	1918.3	3059.3	4889	9755	9.8	9.8	9.0
rev/000$ GNP	.01	.04	.54	1.18	—	—	—
Total Vid/Tel Revenue (mil$)	10	118	2630	11535	63.8	86.0	20.3
Videotex Revenues	10	118	2135	9910	63.8	78.4	21.2
Residential	10	118	1675	8000	63.8	70.0	21.6
Business	—	neg	460	1910	—	—	19.5
Teletext Revenues	—	—	495	1625	—	—	16.0
Households (mil)	74.1	83.5	92.9	105.0	2.4	2.2	1.5
% with Videotex	neg	.1	6.0	20.0	—	—	—
Households with Videotex (mil)	neg	.1	5.6	21.0	—	123.7	18.0
revenue/hshld/month	—	98	25	32	—	−23.9	3.1
% with Teletext	—	—	8.1	62.9	—	—	—
Households with Teletext (mil)	—	—	7.5	66	—	—	31.2
revenue/hshld/month	—	—	5.5	2.1	—	—	−11.3

SOURCE: Predicasts, Inc.; Cleveland, Ohio

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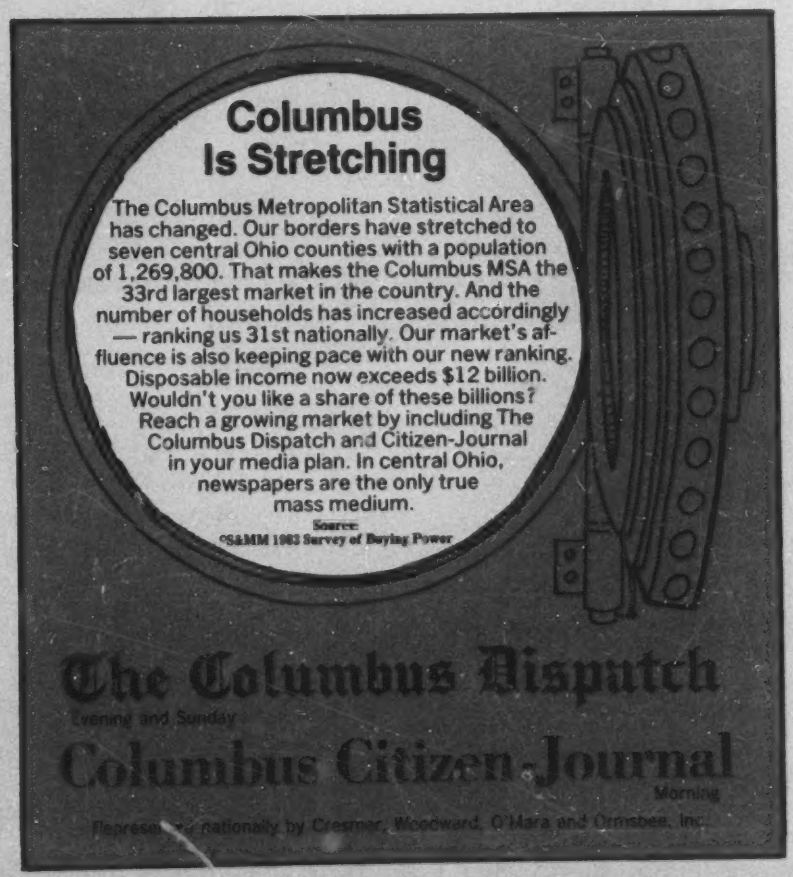
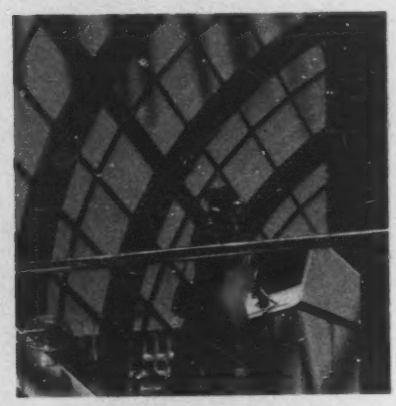

Columbus
Is Stretching
The Columbus Metropolitan Statistical Area has changed. Our borders have stretched to seven central Ohio counties with a population of 1,269,800. That makes the Columbus MSA the 33rd largest market in the country. And the number of households has increased accordingly — ranking us 31st nationally. Our market's affluence is also keeping pace with our new ranking. Disposable income now exceeds $12 billion. Wouldn't you like a share of these billions? Reach a growing market by including The Columbus Dispatch and Citizen-Journal in your media plan. In central Ohio, newspapers are the only true mass medium.
Source:
*S&MM 1983 Survey of Buying Power
The Columbus Dispatch
Evening and Sunday
Columbus Citizen-Journal
Morning
Represented nationally by Cresmer, Woodward, O'Mara and Ormsbee, Inc.

THE NEW ELECTRONICS

Videotex gets malled in San Francisco



Shopping while shopping

However long it takes for electronic information access to get into the home, in California's Bay Area, public access to information terminals is being provided. The Bay Area Teleguide, developed by the San Francisco *Chronicle* and Infomart, of Toronto, Canada, with Videotex America, will place 300 terminals at public locations by the end of 1984. Installation in the city begins the first of 1984. The terminals will be located in shopping malls, hotel lobbies, public transit stations and tourist attractions.

Basic cost to information providers is $200 per page per year plus a one-time listing fee and page creation costs. Initially, there will be an index of 14 categories.

Peter E. Thieriot, president of Chronicle Videotex, Inc., commented, "Teleguide is not an advertising vehicle. It is an information bridge which offers users one centralized source of information about merchandise and services available in the Bay Area. It's an effective, non-intrusive way to supplement advertising expenditures at the moment purchasing decisions are about to be made."

Figures in on electronic publishing

Still an infant industry, electronic publishing is gradually building its base. As of mid-1983, 88 newspapers are providing 1.4 million U.S. households with electronic information via cable television channels.

A report on the industry from Pacific Satellite Corporation, San Francisco, shows that some newspapers are turning a profit on their newsvideo operations. Revenues range from a high of $30 per cable subscriber per year, to a low of $.50.

Two-thirds of the newsvideo ventures studied have been in operation for less than three years. But several report revenues which exceed operating expenses.

The average capital investment reported by newsvideo publishers for electronic equipment, software and other hardware was $49,076, according to the report.

Ads on pay cable may win support

Limited advertising on pay cable channels could be the solution to the churn, according to findings from Statistical Research, Inc., in Westfield, N.J.

The study documents why people bought cable, why they bought or added premium channels and why they dropped some services.

Among the highlights is that three quarters of persons who have premium channels are willing to accept advertising on those services in exchange for cost stability if ads appear between programs, with no commercial interruptions of the programs.

Also, 37% would be willing to accept show interrupting commercials if the pod length were half of what it is on commercial broadcast television.

INTV/Simmons study yields positive results

A recent study conducted by the Association of Independent Television Stations and Simmons Market Research Bureau happily confirmed what independent station managers have been claiming for quite some time: "Independent and affiliate viewing composition is the same in key socio-economic demographics and product usage characteristics."

Conducted in 38 major market ADI's with 10,175 18+ adults surveyed, the study also found that product usage/purchase characteristics in big ticket categories did not differ between affiliate and independent station viewers across day parts.

Product categories viewers were surveyed on include: air travel/foreign, new car past two years, stereo components, fast food $8+/month, grocery $70+/week, women's jeans, opened savings/checking past year, imported beer, imported wine and spent $100+/dept. store, past 3 months.

UPSCALE DEMOGRAPHICS
Adults 18+/Average Half-Hour

	$35,000+ HH Inc. % Comp.	Graduated College % Comp.	Professional/ Manager % Comp.
Early Fringe			
IND	15	13	15
AFF	17	16	15
Prime Access			
IND	18	17	18
AFF	16	14	13
Prime			
IND	19	17	19
AFF	19	16	17
Late Fringe			
IND	18	18	22
AFF	22	18	19
Late evening			
IND	16	18	18
AFF	19	17	17

Simmy Sussman on media salaries

Simmy Sussman, marketing and ad agency placement specialist, surveys the marketplace and finds high compensation for quality media people.

At this writing, there is a young fellow driving across the country to accept a post from a national advertiser for two and a half times his agency salary. His new title will be director of national media, and he will be working for the company he serviced as a client.

The man has a total of five years experience, beginning with one year in New York, two years with a major midwestern agency on a substantial piece of business, and one more year in New York. It should be reported that on his return to New York, after two years in the hinterlands, he had two offers.

Now after a year, he leaves New York to take on a plum assignment. When one is good, the media marketplace is ripe with opportunities.

Another case in point is a 26-year-old woman, in the business since October 1978, who is considering an offer ranging from $48K to $50K. Her career thus far: two years at one major agency, starting as an assignment planner, moving up to senior planner on a major package good piece of business. She moved to another agency as a media supervisor. Her ex-

perience includes work on such blue chip business as General Foods.

What does all this mean? Although those who are good can write their own ticket, the problem of finding good media people is itself becoming more acute.

The training situation

And the situation may get worse if there are no training programs soon. Thousand of youngsters who have decided to go into advertising are either roaming the streets, trying to arrange interviews or figuring out precisely what they want to do in the field. But most of them are not directed or have no focused goals. And even those looking into media have problems, since the major agencies have not kept up with their training programs.

This is a business that must recharge itself with people. Youth must be trained for the business to survive. Fortunately, there are a few agencies that have seriously continued their training programs, the best of which are in the New York offices of Young & Rubicam and Benton & Bowles. They bring in entry-level media trainees, put them through their own system, rotating them on different accounts, and finally promoting them into planning positions. Those who stay can make it to supervisor, assistant media director, and on up the line.

One problem is that there are too few of these training programs. Another is that these larger agencies are targets for smaller shops looking for media planners.

Why do I call them targets? Media departments in the agencies that train have passed on their own standards and finely honed techniques, to the point that the agencies that don't want to invest in training go there. The trained planners have become quite desirable, and are therefore vulnerable to monetary offers. Both Benton & Bowles and Y&R have tried to counteract this movement by consistently promoting from within.

The media exit

Another danger to media's future is that many people look at the area as a stepping stone to other careers. Now, at top 10 agencies, few people are moved into account management from media. But these agencies also tend to

Continued on page 144

How salaries range in marketing and media at

major 4A advertising agencies

MEDIA	
1. Executive vp-director of marketing services	$70,000—$150,000.
2. Senior vp-media director	$50,000—$125,000.
3. VP-director of local broadcast management	$40,000—$ 80,000.
4. VP-associate media director	$32,000—$100,000.
5. VP-assistant media director	$32,000—$ 45,000.
6. Assistant media director or media supervisor	$20,000—$ 35,000.
7. Buying supervisor	$25,000—$ 40,000.
8. Director out-of-home media	$25,000—$ 40,000.
9. Media planner	$12,000—$ 30,000.
10. Media buyer	$12,000—$ 25,000.
11. Assistant media planner	$10,000—$ 13,000.
MEDIA RESEARCH	
1. Senior vp-director	$50,000—$ 75,000.
2. Associate director of research information	$28,000—$ 50,000.
3. Media research supervisor	$22,000—$ 30,000.
BROADCAST/NETWORK	
1. Sr. vp-associate director	$65,000—$120,000.
2. Vp-associate director	$45,000—$ 80,000.
3. Vp-program director	$32,500—$ 60,000.
4. Account executive	$25,000—$ 40,000.
5. Syndication specialist	$25,000—$ 55,000.
6. Broadcast assistant	$12,000—$ 16,000.
7. Staff assistant	$10,000—$ 13,000.
COMPUTER APPLICATIONS (MEDIA)	
1. Director	$40,000—$ 70,000.
2. Program & systems supervisor	$25,000—$ 40,000.
3. Programer	$18,000—$ 25,000.

Compensation package applicable to some degree to those at vp title and above

Package includes:	**Deferred compensation**	**$ 5,000. to $15,000.**
	Management bonus	**$12,000. to $45,000.**
	Stock options	**100 to 2,000 shares**
	Restricted stock	**100 to 1,000 shares**

Other possible benefits: Company car (usually new car every two years). Club dues, assessments, and expenses fully paid. All medical and dental bills 100% reimbursed. Company paid financial advisory service. Savings Plan (Company normally contributes 20¢ to 50¢ for every $1.00 invested, plus interest).

Major corporations

JOB TITLES	
1. Vp-marketing services	$55,000.—$150,000.
2. Vp-advertising services	$40,000.—$100,000.
3. Vp-corporate communications	$50,000.—$ 80,000.
4. Media director	$40,000.—$100,000.
5. Associate media manager	$30,000.—$ 50,000.
6. Network negotiator	$30,000.—$ 50,000.
7. Manager, spot buying	$20,000.—$ 40,000.
8. Media planner/buyer	$14,000.—$ 25,000.

Compensation package applicable to those at vp title and above

Package includes: **Bonus (0 to 20% at all levels). Deferred compensation (discretionary). Management bonus (discretionary). Stock options (discretionary).**

Other benefits: **Tuition refund (depending upon corporation).**

** Agency figures are from 1,537 executives at 40 advertising agencies, most of them in New York. The advertiser information is based on 527 executives at 75 consumer products and service companies. Salaries vary by city and company and not all employers give bonuses to their employees.*

Source: 1983 Survey by Simmy Suleman

BMW SHIFTS (from 78)

Neither headlines nor copy is short. Four-color photographs of the luxury exteriors crown each page.

Copy follows the old mail-order technique of being very specific, fact-packed.

For example, "The 318i engine is modified by a new L-Jetronic system that delivers even greater quickness and torque. Its gearbox has been refined to match the greater torque, while retaining the characteristic precision that has inspired comparisons to fine timepieces . . . "Every ad winds up with a pitch to visit the showroom.

The change in 1984 copy will be a subtle advance from just selling performance to the broader concept of luxury: "The car is not just faster than anybody else's; you also get good handling and luxury."

Among the extras offered is the opportunity to pick up the new car on a trip to Europe, drive it around Europe after a visit to the BMW factory and museum in Munich, and then have it converted to meet U.S. standards and shipped to the U.S. This can save up to $4,000 — and as promotional literature points out — creates the opportunity for a free tour of the continent.

Currently, BMW is not seeking any large expansion of dealers in the United States. But it is doing whatever it can to develop greater activity on the part of the dealers it now has in place.

This includes an expanding array of showroom promotional materials and advertising materials for dealers to place in local media. This is not on a co-op basis, but BMW does provide most of the materials at no cost or below cost.

The BMW success appears to be based on basic marketing and advertising strategy in behalf of a quality product. It is spending more per car for advertising than most of its competitors. It is concentrating on advertising at very specific target markets — both geographically and demographically. And it is moving up rapidly in share of a rarified marketplace.

Carroll Swan

SALARIES (from 85)

question the expense of recruiting MBAs. So the media department becomes an excellent training ground for those willing to spend two years in media before moving to account management.

How are these lower level account management spots usually filled? Either with MBAs, as I mentioned before, who have been brought into account management training programs. This all means we are losing up to five planners at once to account management — from a single media department. It is not unusual for a personnel manager to call me and say, "we lost five planners today."

The breakdown is usually like this: three are going into account management, one decides to go to Wall Street and try making more money, the other one goes into sales.

How do we go about correcting this situation? This situation has worsened with time. Because low entry-level salaries make newcomers scarce, it is going to create crisis upon crisis. What does all this mean to us today? Well, let's look carefully at the result. Those who have superb skills, come from a fine agency, who have learned to package themselves properly and who have worked on major pieces of business, will always be able to find a spot.

The question is to find the right spot for themselves. This is a question of luck, timing, supply and demand. It is really just as simple as that.

Looking for the media director

New things have happened in the search for media talent. Today, everybody seems interested in status instead of experience in terms of years spent at an agency. The star system is "it" in the media business.

Agency presidents are looking for those with "pizzazz." It is very difficult to predict what each agency will be looking for, but there is a new standard in general. The person who has stayed in one or two positions for ten or fifteen years may not be the star these agencies want to present in the current media scene.

It's stardom forever, and that's what seems to count. Credentials just don't seem to be as important as they used to be.

The out of town market place

What is it like out of town, compared with five years ago? Well, media has certainly spread all over the country. Agencies outside New York are eager to buy good talent. Why might one relocate? It is a question of opportunity and lifestyle. People who are tired of living in a big city and dealing with its paranoia and pressures are those most likely to consider a move from major markets. New York, Chicago, Los Angeles, Washington, Boston, Dallas, Houston, Detroit, Minneapolis — these are the cities that have become hot spots. Clients in all of these marketplaces are willing to pay top dollar for talent.

Corporate focus on agencies

I have done a survey of major executives in corporations throughout the United States. How do they feel about the departments? What is it that they truly want? The larger clients have really found the creative process to be an important one. But they also want to know how their dollars are being spent. Mid-sized agencies continue to find it difficult to compete with the enormous resources of the larger shops. But in the end, the client wants results, and the results are only going to measured by how well the media are put to use. The best creative product, regardless of how superb it might be, will never realize its potential unless the media people position it so that the product will move.

We all remember that the name of the game is sales. Results are only gotten by investing in the best talent an agency can afford to buy. When I say that, I mean from the bottom up. So let us begin at the bottom. Let us hope that through the '80's, those agencies dedicated to superior advertising will make their investment in people, in resources, and in training. ■

"Everybody seems interested in status instead of experience. The star system is 'it.'"

Advertising on PBS reality or fantasy?

Would a television network that weekly penetrates over one-half of U.S. households and captivates those households for almost three hours of viewing be a good media buy? Public television generated these figures recently, and they came at a time when advertising was being contemplated as a source of additional revenues. However, the possibility of advertising on public television has raised a number of issues — issues which are reviewed in this article along with a look at public television (PTV) as a media buy.

An Advertising Experiment

Faced with shortages of public funds, Congress in 1982 authorized an experiment whereby individual PTV stations voluntarily ran advertisements in their respective markets. Figure 1 shows the stations involved and the dates when advertising first appeared. The experiment ended June 30, 1983, and reports from the stations were due to be submitted by September 30, 1983, to the Temporary Commission on Alternative Financing for Public Telecommunications. Smaller stations in the experiment collected about 13% of their budgets via advertising revenues while the larger ones garnered about 5%.

The Public Broadcasting Service (PBS) is a network of approximately 300 PTV stations, and critics of the experiment point out that the ten participating stations should not be seen as constituting a representative sample of the network, thus questioning the

By Dr. Jack E. Forrest, Associate Professor, Marketing, Belmont College, Nashville, TN.

reliability of the results. On the other hand, even though the stations were not randomly selected on an equal probability basis, the data generated by the participant stations can be useful on a judgement basis as case-in-point experiences. Congressional hearings on the whole matter of PTV advertisements are to be conducted in the Spring of 1984, at which time the issues raised promise to be hotly debated.

Some advertising issues

Since public television funding has been generated largely from tax revenues in contrast to advertising-generated revenues of commercial television, the use of advertising by PTV stations has been criticized as a departure from traditional funding and an intrusion into the funding "domain" of commercial television (CTV).

As a departure, the practice of advertising by public television does not necessarily mean an abandonment of public funding — advertising can be viewed as an additional source of funds. Nevertheless, the presence of advertising on PTV stations has led some in the industry to conclude that programing would be adversely affected in that advertisers would exert pressure on program directors to cater to larger, less discriminating audiences by airing such fare as sitcoms and game shows.

Opponents to PTV advertisements have also pointed out there is the potential that PTV advertisers would want to transform PTV into another commercial network. The result would be one of enhancing PTV programing, not diluting it, and advertisers would be able to deal with selective audiences heretofore thought to be impractical to reach through commercial means.

Tentative results from the experiment indicate little adverse public reaction developed over the advertising.

As an intrusion into the "domain" of commercial television, some CTV observers have been critical of PTV advertising as unfair competition. With public television receiving public funding, advertising rates of PTV stations can be lower than those of CTV stations thus forcing tax-paying commercial stations to compete unequally.

Figure 1

Public Television Stations Volunteering —
For An Advertising Enhanced Underwriting Experiment

PTV Station	City	1982 Starting Date
WYES	New Orleans	March 26
KCSM	San Mateo	May 21
WPBT	Miami	May 24
WHYY	Philadelphia	June 1
WIPB	Muncie	June 2
WTTW	Chicago	June 14
WQED	Pittsburgh	August 17
WQLN	Erie	September 9
WNET	New York	November 21
WSKG	Binghamton	(No Start)

Source: Temporary Commission on Alternative Financing for Public Telecommunications

However, there seems to be very little duplication of PTV/CTV audiences so that direct competition is unlikely. Some commercial stations have generously provided promotional assistance to public stations in such forms as public service announcements and furnishing personalities for fund-raising activities. These are hardly the acts of direct competitors.

Only moderate levels of advertising revenues are likely to be generated by PTV particularly if self-imposed limitations are placed on advertisng placements. Restrictions on the number of spots and types of advertising accepted were part of the experiment and would be determined by each PTV station.

On balance, it appears that many advertisers would expand their promotion budgets to access upbeat PTV audiences, maintaining their current levels of CTV reach and frequency. Moreover, firms which in the past have been hesitant about using advertising at all may now find PTV to be a medium which closely reflects an image they prefer to project. Professional services like dentists, lawyers, physicians, and accountants could have in PTV an opportunity to communicate messages not well suited for commercial media. If the medium is the message, PTV certainly says something different.

Some technical matters must be settled if PTV is to furnish advertising time. Such matters include clarifiying the tax status off revenues, the purchase price of syndicated research data, copyrights, and union contracts. The technical matters and controversial issues notwithstanding, it is anticipated that Congress will authorize the placement of advertisements on public television leaving it to individual stations to decide whether to do so.

Figure 2

Nielsen Ratings and Audience Shares for Selected WYES, New Orleans, Programs
February 1983

Program	Rating (%)	Share (%)
Nova	5	9
Frontline	3	4
Life on Earth	4	6
Thursday movies	2	4
Wall Street Week	3	4
Saturday Night Comedy Strip	5	10

Source: WYES-TV 12, New Orleans

Figure 3

Monthly PBS Penetration Into Demographic Groups
April 1983

	Full Day			Prime Time		
	1982	1983	% Change	1982	1983	% Change
Composite	44.2	52.6	+19	26.6	28.8	+ 8
Race						
White	46.2	54.5	+18	29.4	30.8	+ 5
Non-White	331.	41.6	+26	11.0	17.2	+56
Children						
None	39.5	46.7	+18	27.6	31.1	+13
Any	51.3	61.7	+20	25.0	25.2	+ 1
Any 12-17	47.5	62.0	+31	28.5	27.5	- 4
Any 6-11	55.8	62.1	+11	27.4	21.2	-23
Any less than 6	55.6	64.3	+16	22.3	24.3	+ 9
Education						
Fewer than 4 Years H.S.	40.7	46.6	+14	20.0	22.2	+11
4 Years High School	44.5	50.3	+13	27.1	25.3	- 7
1-3 Years College	42.2	56.4	+34	26.4	32.8	+24
4+ Years College	50.8	62.7	+23	36.4	41.8	+15
Occupation						
Prof/Owner/Mgr.	50.6	63.1	+25	32.6	37.4	+15
Clerical & Sales	42.5	48.5	+14	28.3	25.1	- 3
Skilled & Semi-skilled	42.4	50.6	+19	21.2	21.9	+ 5
Not in Labor Force	41.4	47.4	+14	27.3	31.0	+14
Income						
Less than $10,000	33.5	37.5	+12	18.7	17.9	- 4
$10,000-$19,999	43.3	51.5	+19	24.9	25.1	+ 1
$20,000-$29,999	47.8	56.8	+19	28.1	28.5	+ 1
$30,000+	52.1	61.8	+19	34.5	40.2	+17
Age						
Less than 35	42.7	46.5	+ 2	21.3	18.3	-14
35-49	49.5	57.4	+ 2	29.0	31.9	+10
50-64	NA	58.2	—	NA	36.6	—
65+	NA	49.8	—	NA	32.5	—
County Size						
A	48.3	54.4	+13	29.7	34.7	+17
B	40.0	53.4	+34	24.6	28.0	+14
C + D	42.6	49.1	+15	24.2	21.1	-13
Cable						
Non-Cable	NA	46.6	—	NA	25.5	—
Pay Cable	NA	67.9	—	NA	36.2	—
Basic Cable	NA	59.4	—	NA	33.8	—

Source: PBS Research, Washington, D.C.

A PTV media buy

One thing the advertising experiment seems to reveal is that only a few PTV stations are eager to begin seeking advertisers. Perhaps as many as 30 stations (ten percent) would be in an initial group of stations opting for advertising. It is not likely that advertisments would be carried via satellite to PBS stations so media buyers should not think in terms of network buys. Instead, buyers will deal with individual stations or with a cooperating group of stations accepting advertisements.

During the experiment, WYES in New Orleans sold prime time :30s for $200 (rotation) and $400 (fixed). Gross sales in the effort were about $436,000 from 151 advertisers reaching weekly cume audiences ranging from 45 to 49 percent. Some of the better WYES estimated prime time audience figures reported by Nielsen are shown in Figure 2. The ratings are about the same for both men and women ages 25 to 54.

A media buy for stations like WYES with relatively low audience estimates can be made by emphasizing cume audiences, scattering a number of advertisements throughout a time period. Some local radio and independent commercial television stations have found success selling time in such a manner. In the few cases where a specific audience is identified with certain programs, a buyer can make placements adjacent to them for a more selective media buy.

Public television stations accepting advertising will need to increase the data available regarding the demographic and psychographic make-up of their respective audiences so buyers

Gov. PBS Panel against taking ads

The special Temporary Commission on Alternative Financing, voted 10 to 1 against out-and-out advertising on public tv, but left the door open for enhanced on-air credits for program underwriters. The panel recommended that Public TV's use of selective spots as a device to raise funding, should be ended, but called for rule changes that would permit the mention of brand names and corporate of product slogans. The recommendations would also permit institutional pitches, but sales messages would still be barred. The findings of the Congressionally created Commission have been forwarded to Congress. Sources within the commission hope the findings end the impression that advertising would be a panacea tor Public Television economic shorts.

can make more informed placements. Such information is generally lacking among PTV stations at present. In the meantime, the national audience estimates based on Nielsen research found in Figure 3 give a general indication of the demographic profile of the PBS network.

While PTV has a respectable following within each demographic category, its upbeat audience is reflected in the penetration levels of Figure 3, particularly in the four-plus years of college, professional/owner/manager occupations, and $30,000-plus income groups. In fact, Roper Reports describes the upbeat PTV audience as viewers who have:

- Significantly higher exposure to print, cable tv and FM radio.
- Broader personal horizons; more personal communication with others, more hobby and travel activities.
- More contemporary activity.

The PTV viewer is a person a lot of advertisers would be interested in reaching, Roper concludes.

Looking ahead

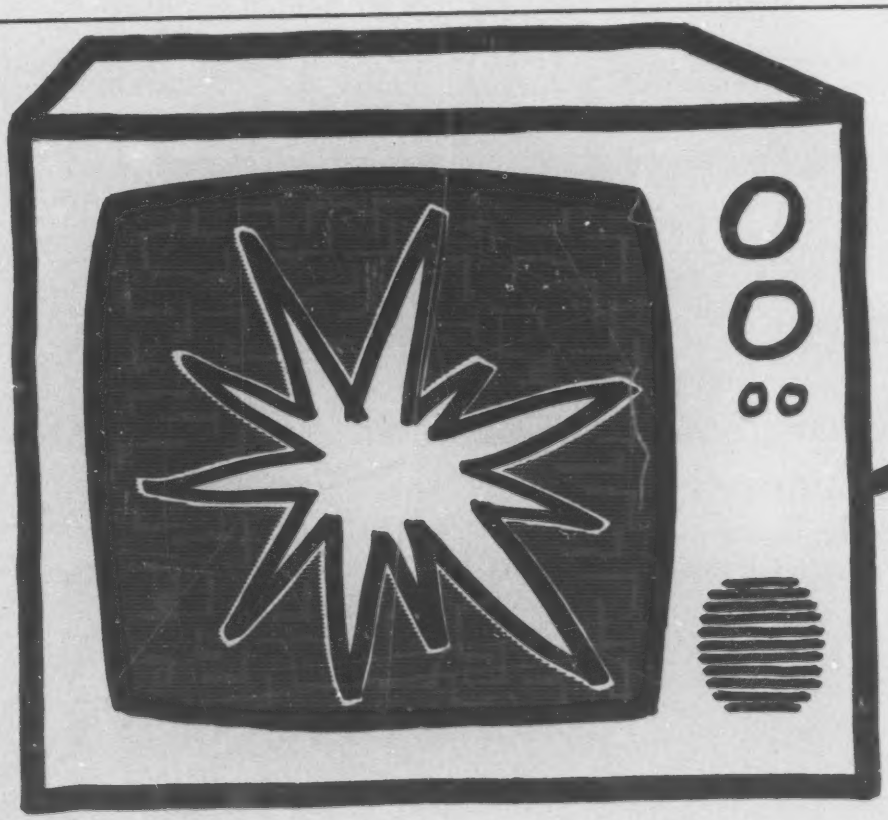
The PTV advertising drama will unfold in Washington D.C., where proponents and opponents will be heard by Congress.

If advertising is approved, adopting stations will have to deal with additional operating expenses associated with sales, billing, and research personnel as well as those pertaining to studio production of advertisements.

Guided by the integrity of the leader within the PTV industry, changes will be gradual with minimal disturbance.

The CTV industry will take a wait-and-see position, seeking in some cases to find areas of mutual interest with PTV where cooperative efforts like joint use of video equipment can be affected.

As one CTV station's general manager indicated, having the PTV camel's competitive nose in the tent is okay initially, but developments will be watched closely. Chances, for fruition of the project, are slim.



Wher

These days, many affluent Houstonians are playing a gam that you can't win.

Currently, 25% of Houston adults with household incomes

Auto sales green — so are ads

Domestic automakers are tempting young, affluent consumers with the promise of improved quality, performance and state-of-the-art technology. But while domestic auto sales increased by 24.0% in the third quarter of 1983, the imports are continuing to make new inroads into the luxury end of the market.

As new car sales continue to show dramatic gains over last year, auto executives, once a glum and despondent group, are slowly beginning to perk up.

With a 24.0% increase in sales over last year's levels, much of the domestic auto industry's growth is attributed to an overall turnaround in the economy as well as the returns of an $80 billion, four-year investment in building new factories and retooling others to reduce production costs.

Although overall advertising expenditures are not increasing dramatically over last year, they are expected to rise at a gradual rate as advertisers

put more emphasis on maintaining their upward momentum and regaining a large share of the market lost to the imports.

Along these lines, advertisers will be placing much of their ad dollars in California, where 10% of the American car market currently resides.

Considered a place where industry trends evolve and then slowly ripple out to the rest of the country, California's auto sales are dominated 50% by imports while nationally imports hold a 27% share of the market.

Although it's rumored that kids growing up in California think that Toyota is an American car, Lincoln-Mercury, along with a number of other domestic car makers are doing all they can to convince them otherwise.

Notes Chuck Riley, vp group director for L-M at Young and Rubicam, "We're concentrating heavily on the west coast market by emphasizing specific features in different television spots. We even have an 800 number to appeal to those consumers who don't believe we have the kinds of cars they're looking for."

To lure Californians back into the domestic market, automakers are appealing to changing lifestyles by offering two-seater sports cars for upscale singles, van/wagons for active, outdoor enthusiasts and turbo-charged sports cars aimed at the higher performance market.

According to one industry source, domestic car makers are finally beginning to realize that there's a different mind set in California compared to the rest of the country. On the east coast people are defined by what they do, careerwise. But on the west coast, people are characterized by their recreational interests.

To add more fuel to their domestic marketing fires, in California automak-

Automotive media expenditures, 1982

	Magazines	Supps	Net tv	Spot tv	Net radio	Outdoor	Spot radio	Newspapers	8-media total
American Motors Corp.	$15,458.3		$12,733.7	$ 6,105.4		$ 2.8	$ 147.3	$ 1,308.6	$ 35,756.1
Chrysler Corporate	852.5		26,358.2	6,580.7	$ 812.8	42.4		6,281.1	40,927.7
Chrysler	7,812.5		7,356.6	1,003.8		377.5		635.9	17,186.3
Dodge	9,053.3		18,167.3	6,087.3		57.7	11,997.2	1,317.7	46,680.5
Plymouth	5,578.4		9,685.9	4,636.6		141.0		1,805.7	21,847.6
Ford Corporate	17,467.6		24,437.8	2,367.3	3,581.4	10	140.1	217.7	48,221.9
Ford Division	19,952.3		50,978.0	4,027.3		733.2	20,473.9	13,441.2	109,605.9
Lincoln-Mercury	8,641.7	$ 88.8	28,302.9	11,481.1	1,270.4	32.4	1,162.7	2,841.4	53,822.4
General Motors Corporate	9,270.1	1,457.6	9,067.2	11.5	438.3	5.3		51.2	20,301.2
Buick	8,217.1	105.6	13,763.0	2,028	2,892.6	540.3	248.9	522.2	28,317.7
Cadillac	5,123.1	46.2	6,992.3	2,581.4		548.9	689.9	827.3	16,809.1
Chevrolet	22,099		57,095.2	2,835.8	326.5	3,120.3	13,957.8	2,202.4	101,637.0
Oldsmobile	10,740.1		9,631.5	8,199	496.1	75.6	3,998.6	6,013.2	39,154.1
Pontiac	10,240.1		18,849.6	8,987		80.2		823.7	
Honda	8,845.6	236.4	12,897.7	1,205.9	1,238.9	203.5	1,698.7	1,151.0	26,863.4
Nissan	10,822.8	262.2	16,920.5	20,169.2		730.2	11,382.6	3,991.0	39,310.5
Toyota	8,535.7		15,671.7	30,152.4	99.3	1,589.9	3,622.6	11,252.6	70,924.2
Volkswagen	25,619.9	126.6	21,684.9	16,780.2		53.2	2,104.4	1,404.1	67,733.3

* Eight media totals are compiled from factory expenditures recorded in 1982
Leading National Advertisers (magazines, supps, network tv, spot tv, network radio, outdoor), Radio Expenditure Reports (spot radio) and Media Records (newspapers).

WAGONEER FROM JEEP is at home on the ranch. Copy addresses ability of the versatile vehicle to "master any terrain."

JOE CAPPY, vp, marketing group, American Motors Corporation: advertising Renault as a brand name.

SAFE ON ANY SURFACE: The Grand Wagoneer covers any surface that water doesn't, Compton copy reads for this vehicle.

ers are also offering consumers sweetener option packages not available in the rest of the country.

Chrysler offers AM/FM radios, power steering, tinted windows, wheel covers and air conditioning for $125 to $375 under the retail price. Ford tempts potential customers with a five-speed transmission option on its Ranger light pickup at no extra charge, an estimated $226 saving.

Instead of launching their counter offensive from Detroit, a number of domestic auto makers have set up design studios and marketing offices on the west coast — a step that their Japanese competitors took some years ago.

Although domestics have stepped up their marketing efforts both on the west coast and nationally, it remains questionable whether they will be able to win back a large chunk of the American car market lost to the imports.

Says Joe Opre, director of advertising, Nissan, "The domestics are definitely establishing a marketing offensive out here. Whether it is biting into our market share is hard to say. We're doubtful that they could do it overnight."

Also at issue are the quota restraints placed on the imports for the coming year. While most of the domestic automakers are pressing Washington to hold the import quota level at 1,680,000 units, General Motors wants the quota upped to 2 million units so that it will be able to import Isuzu and Suzuki subcompacts.

American Motors Corporation

Building on the success of the jointly produced Alliance sedan, American Motors Corporation and Renault are going after a repeat performance with the Encore, a sporty hatchback.

Introduced in early September, the advertising campaign for the Encore's launch is expected to exceed last year's $10 million kickoff for the Alliance.

Targeted to consumers as an affordable, European styled car, roughly 75% of the Encore's advertising campaign is slated for television with the remainder in print.

To emphasize the car's versatility in handling performance and fuel efficiency, commercials produced by George Lucas under the supervision of Grey Advertising show the car magically bend, shrink and then expand.

To get more mileage out of Renault's positive consumer image, the French car company's name appears across the television screen in large letters with a tagline: Renault. The One to Watch.

In the Encore's print campaign, the Renault name is once again emphasized in large, bold face type.

Explains Joseph Cappy, vp, marketing group for AMC, "Our strategy is to advertise Renault as a brand name."

In addition to the Encore and a continued advertising emphasis on the Alliance, AMC is placing a large percentage of its budget on the Cherokee and Wagoneer jeeps.

The Cherokee is targeted to outdoor sports enthusiasts, 30-35, while the Wagoneer is aimed at people who are interested in station wagons but want improved fuel efficiency and extra comfort.

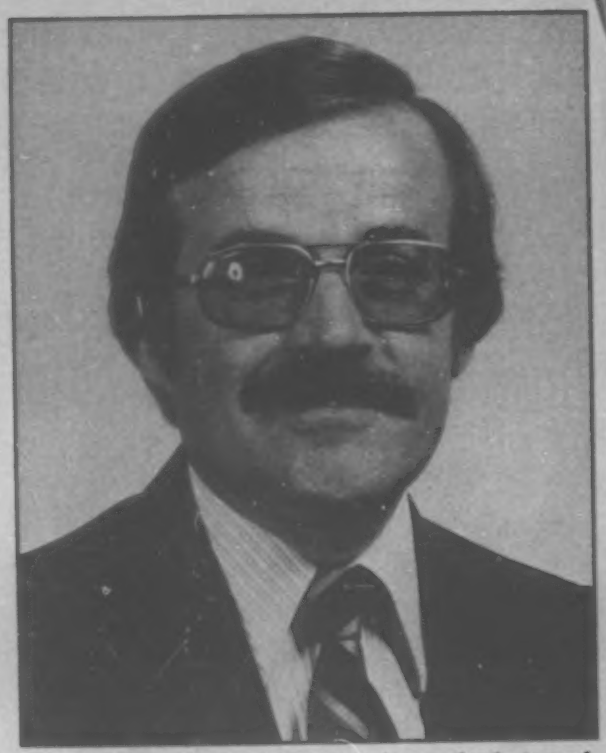
Chrysler Corporation

With Chrysler Corporation's financial woes behind it, the company is now striving to change its image from a conservative car maker to a state-of-the-art trendsetter.

To reach younger, yet affluent buyers, Chrysler compares its new Laser sports car with the Porsche 944. The

"Our strategy is to advertise Renault as a brand name"

Nissan plays up luxury, technology and performance in ads for Maxima aimed at upscale, import purchasers.



Fuel efficiency is no longer an issue that's top-of-mind with consumers, according to Joe Opre, director of advertising, Nissan.

Sunshine. Everybody loves the all-new, exciting Sunday magazine in the Fort Lauderdale News/Sun-Sentinel.

SUNSHINE Magazine Shines On:

- Florida's Fastest Growing Market— Fort Lauderdale
- Florida's Best Retail Market— Fort Lauderdale
- Great Newspaper Coverage
- Great 4-Color Reproduction

EVERYBODY LOVES Sunshine

Fort Lauderdale News/Sun-Sentinel. Represented nationally by Metropolitan Sunday Newspapers, Inc., C.W.O. & O. Inc. In Florida by Publishers Representatives of Florida.

Lasers print campaign includes gatefolds in newsweeklies and enthusiast magazines and five-color spreads in 17 other publications.

A heavy network television campaign calls attention to America's first front-wheel drive sports car.

Ricardo Montalban will once again be the spokesman for the Chrysler New Yorker, E Class and Le Baron cars on network tv and print for national as well as regional coverage.

To change Dodge's image from stodgy to contemporary, the company has launched a new "American Revolution" advertising campaign for its '84 model cars, the turbo-charged Daytona sports car and the Caravan wagon.

Notes Joseph Cronin, Dodge advertising manager, "We had to make a quantum leap in terms of the demographics we were appealing to and the kind of cars we were putting out.

"Our present goal is to reach a younger demographic. To accomplish this we've changed our media strategy by assigning different roles to television and print."

The key behind Dodge's media philosophy both in broadcast and print is not only to provide diversity of me-

SUPER
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SUPER

A
SUPER
Newspaper in a
SUPER
Market
THE
TAMPA
TRIBUNE

Reach more
Sales
Producing
Prospects
With
Tampa Bay's
QUALITY BUY...

Find out why The Tampa Tribune is the quality buy in the Tampa Bay market. Just send us your business card and we'll mail you our latest market brief, "The Quality Buy."

Contact
Byron Taggart, General Advertising Mgr. c/o
The Tampa Tribune P.O. Box 191 Tampa, FL
33601 (813) 272-7447

THE
TAMPA TRIBUNE
Morning and Sunday

The Quality Buy

Represented by Sawyer Ferguson Walker
Source: SMRB, Survey of Buying Power,
July, 1982

Site of the 1984
SUPER
BOWL!

diums but to create impact and awareness. Dodge purchases billboard positions on television movies and specials. And although this year the company shortened its list of magazines, Cronin notes that Dodge has increased its overall number of advertising pages to create added impact.

The "American Revolution" campaign will be BBDO's first efforts for Dodge since the switch from Kenyon & Eckhardt last January.

In addition to television and magazines, Dodge also purchases spot and network radio and has dealer association ads in newspapers.

The Plymouth "Match It! (If You Can)" campaign plays up the company's 5-year/50,000 mile warranty and emphasizes price, mileage and durability for its continuing 1984 nameplates including the Reliant, Horizon and Turismo 2.2. The all-new Plymouth Voyager is expected to be launched late this year.

Ford

After accumulating $3.2 billion in losses from 1980-82, the number two domestic automaker is back on the road to recovery. After several of its models went on sale earlier this year, Ford's market share increased to 17.3 percent in June, July and August, up from 16.2 percent in the beginning of the year.

Similar to other domestic automakers Ford is appealing to younger, more affluent buyers by redesigning the look of its cars and placing greater emphasis on aerodynamics. The company is also calling consumers' attention to the results of an independent survey of owner-reported problems that found that Ford makes the best-built American car.

New from Ford this year are the redesigned Thunderbird, Cougar, Tempo and Topaz. Features emphasized in all of Fords models are electronics, aerodynamics and quality.

While the Topaz is targeted to the upscale end of the younger family market, the Cougar appeals to aggressive car enthusiasts. Both are advertised in network tv and cable to reach a predominantly male audience.

The new Mark VII at Lincoln-Mercury is also aimed at automotive enthusiasts and is heavily advertised in buff books.

General Motors

In an increased effort to establish a more distinct product identity for each of its divisions, General Motors has changed both the design of its cars as well their media positioning.

Chevrolet, now aimed at the low end of the market, is placing most of its ad dollars behind the Celebrity, Cavalier and Camaro.

To support its 1984 cars, Chevrolet is making major tv sports purchases including 43 World Series spots, the largest single sponsorship of the Super Bowl, exclusive auto sponsorship of

MILEAGE: Ford went right at the Honda 750, saying it is "rated approximately four miles per gallon higher" than the motorbike.

COMFORT: goes hand-in-hand with technology, in a Ford, via J. Walter Thompson marketing approach.

BMW 635 CSi
THUNDERBIRD TURBO COUPE
The test.
The procedure was simple. On a 1.067 mile closed-handling course both the Turbo Coupe and the BMW were driven as fast as possible. The test consisted of 10 laps and the car with the fastest average lap timer at the end was declared the winner.
And, the winner is...
The Thunderbird Turbo Coupe
responded by clinging firmly to the road. The Turbo Coupe's cornering attitude remained remarkably level, even through the long sweeping corners thanks to its anti-sway bars, gas-filled front struts and four rear shocks. And, the quick ratio power rack and pinion steering's notable response was clearly evident in the esses and hairpins.
5-speed manual transmission works harmoniously with this engine to deliver quick acceleration at any speed. So, whether it's coming out of a right left hander or a right hand sweeper, there's always enough power to rocket the Turbo Coupe toward the next bend.
The deeper meaning.
The Thunderbird Turbo Coupe is a sophisticated world-class touring car. One that can hold its own against the best the world has to
from Ford. That's right. The Turbo Coupe beat the BMW 635 CSi by an average of 1.0 second per lap.
Fast through the corners.
From the tires to the suspension to the steering, the Thunderbird Turbo Coupe was designed to perform through the twists and turns. The test drivers flung the Turbo Coupe through the corners of the course, and the Goodyear Eagle HR performance radials
Quick out of these.
One of the wonderful things about the Turbo Coupe, as our testers discovered, is that when you put your foot to the floor,
because the 2.3 liter turbo-charged four was specially designed for quick throttle response, even at low revs. The Borg-Warner
Have you driven a Ford... lately?
Get it together. Buckle up.

Thunderbird adds a twist to the old adage: First you join them. Then you beat them.

PERFORMANCE AND DESIGN are the two staples that Ford, via J. Walter Thompson, is emphasizing in the Thunderbird. No longer merely a luxury symbol, Ford emphasizes engineering, design and ability to perform on the straightaway or on a winding course.

the Winter Olympics. Chevrolet will also have a heavy presence in the summer Olympic games.

To target to the youth market, Chevrolet advertises on network radio and is looking into purchases on MTV for the fourth quarter.

Although the Citation II will differ from the Citation only in name, the II version is being launched to counter the car's negative image that resulted from a number of brake defects and other safety hazards found in '83 models.

The Citation II's relaunch includes extensive television and magazine advertising.

Pontiac's themeline is "We build excitement."

According to National Advertising Manager Charlene Curry, "About two years ago we decided we wanted Pontiac to be defined as 'a car innovative in styling and engineering.' "

Fueling Pontiac's image as a high performance, innovative car maker is the new Fiero, a sporty two-seater with Enduroflex body panels that are rustproof and designed to resist minor dents.

Extensive television advertising for the Fiero conveys the car's hi tech image as the car is assembled from scratch and body panels float into place.

Print ads displaying the car on a background grid complement the Fiero's sci-fi commercials.

To reach the Fiero's target audience, 1-2 person upscale households, the company buys time on professional football and other sports programing on network tv, supplemented by spot tv and radio buys in the top thirty markets.

Pontiac also purchases time on ESPN and is looking into MTV to reach young adults.

Similar to other automakers looking to increase their impact in print, Pontiac is using 10 fewer magazines than last year, but the overall schedule was upped by 204 pages.

Industry sources estimate that Pontiac's budget was increased 10%, bringing total expenditures to roughly $55 million.

According to Curry, Pontiac's media mix is 65% broadcast, 35% print.

Unlike Pontiac, Oldsmobile targets to an upscale audience more interested in luxury and styling than supercharged performance.

While the Firenza subcompact is targeted to younger consumers, Oldsmobile's midsize Cutlass line appeals to all age segments according to Oldsmobile advertising manager, P.E. (Butch) Bunker.

"We wanted Pontiac to be defined as a car innovative in styling and engineering"

The Philadelphia ADI . . .

It Won't Fly without

THE MORNING CALL

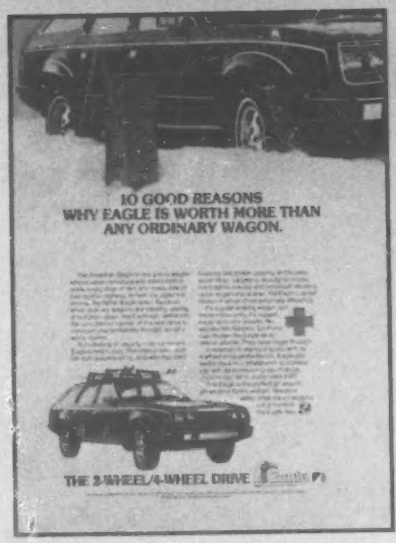
Unless you can afford to pass by more than $473 million in automotive sales.

The Allentown-Bethlehem MSA—it ranks in the top quarter of the country in metro area passenger cars with some 303,000. That's a considerable part of the nation's 4th largest ADI. Only Philadelphia and Pittsburgh have more automotive sales in Pennsylvania. Good advertising to this 4-county gold mine could make auto sales hum. Your problem: effective penetration.

The A-B MSA is fragmented by more than 40 television channels, more than 30 radio stations . . . and buying Philadelphia dailies gives you a reach of no more than 2%.

Only The Morning Call can make it fly. With 66% combined coverage of all adults, 75% coverage of those making $35,000+, The Morning Call is your most concentrated advertising buy. And with record circulation gains in 1982, plus bonus penetration outside the A-B MSA, advertising in The Morning Call now flies farther than ever. Don't leave this precious piece of the Philadelphia ADI by the side of the road. Roll with The Morning Call.

The Morning Call-Allentown, PA-(215) 820-6634
Represented by Creamer, Woodward, O'Mara & Ormsbee,Inc.



MEASURED PERFORMANCE: American Motors extolls the virtues of its Eagle stationwagon.

THE FAMILY UNIT is another logical approach for American Motors, via Compton Advertising.

New in this category are the Cutlass Ciera Landau Coupe, the Cutlass Ciera Holiday Coupe and the Cutlass Cruiser Wagon.

Oldsmobile's media plans are custom tailored to specific car lines.

Notes Bunker, "We try to target each car campaign to a special interest group. For a lay technical market, we might advertise in an engineering trade publication."

To reach this group on television, Oldsmobile purchases time on news programing.

In addition to news, prime time is puchased to cover all market segments.

Although cable expenditures were not substantially increased over last year, according to Bunker, Oldsmobile is looking into the possibility of developing a more extensive cable campaign in the future.

Spot radio is purchased for heavy-ups in specific markets.

Although Buick is not launching any new car entries this Fall, the company is expected to be introducing a full-sized luxury car, the Electra, next Spring.

Advertising for Buick's current lineup, which includes the Skyhawk (subcompact), Century (intermediate), LeSabre (full size) and Riviera (luxury specialty car), is on network tv news programing and Monday Night Football.

Buick also purchases CBS Radio Network for the World Series and NFL football games and Mutual for NCAA and Notre Dame games. Cable buys include WTBS, CNN and ESPN.

Having lost significant shares of the luxury car market to the imports, Cadillac intends to increase its share of this market by at least 2% this year.

The company's projected sales goal for 1984 is close to its 1978 record of 347,000 cars sold.

Fueling the company's great sales expectations are its replacement models for the DeVille and Fleetwood which received high scores with younger import purchasers.

However, postponement of GM's large, front-wheel drive, C-body cars, which include both of these lines, might make Cadillac's optimistic sales projections less than likely.

Another Cadillac presently on the drawing board is a smaller Cimarron with an optional 2.8 liter, V-6 engine, aimed at an affluent demographic, 25-40.

Honda

In an effort to create added awareness and impact, Honda is dedicating a different model to each month.

November will be the month for the new Civic CRX, a sporty, two-seater with outstanding fuel efficiency: 51 mpg/city; 67 mpg/highway.

Priced under $6,000, the CRX is

ONLY IN A JEEP: Love of the outdoors combines with the rugged ride of the Jeep. Compton brings lush nature photographs together with the jeep's ability to go places conventional automobiles don't.

expected to gain popularity among women.

Commercials stressing fuel economy, styling and affordability will air on network tv and will be supported by print in a broad range of newsweeklies, consumer magazines, buff books and women's magazines.

According to a media source from Honda's agency, Needham Harper & Steers, the biggest ad dollars are placed behind the best selling cars.

Along these lines, the Accord, Honda's number one seller, will receive a heavy advertising push this year with commercials that not only call attention to the car but also to the fact that it was made in Honda's Marysville, Ohio plant.

A total of twelve cars will be heavily advertised in each of Honda's three lines which include: the Accord (top of the line luxury cars priced over $10,000), Prelude (sporty cars, priced in the $9,000 range) and Civic (fuel efficient economy cars, priced at $6,000).

According to Leading National Advertisers, Honda increased its total advertising budget from 1981 to 1982 from $22.2 million to $26.9 million. While gains were reflected in network radio, magazine expenditures were decreased from $9.3 million in 1981 to $8.8 million in 1982.

Nissan

The three cars receiving the lions' share of Nissan's advertising dollars are the Nissan Sentra, 300 ZX and 200 SX.

The Sentra is positioned at the low end of Nissan's market and is targeted to college-educated men and women with household incomes in the $20,000 plus range.

The main features emphasized in network tv, spot tv and magazines are roominess, price, performance and quality.

According to Joe Opre, director of advertising for Nissan, "Although our cars are certainly fuel efficient, we're not emphasizing fuel economy because it's no longer an issue that's top of mind."

Eight-Sheet Outdoor Sells . . .

Everything from KOOL Jazz to HOT dogs, and the dozens of things in between. AND America's most cost efficient mass medium sells them from coast to coast at an average audited CPM of less than 30-cents.

If you have something to sell, you'd better look into Eights.

Eight-Sheet Outdoor
Advertising Association, Inc.
Box 457
Independence, MO 64051
816/373-6305

Eight-Sheet Outdoor

He points out, however, that there is an increased interest in technology. He explains, "Given the computer boom and all of its ramifications, people view technology as the solution to their problems."

Along these lines, Nissan calls attention to the 300 ZX's computer-controlled dash and other technological advancements, in advertising targeted to men with household incomes averaging $30,000.

Touted as the flagship of the Nissan line, the 300 ZX is the number one selling sports car in the U.S. The ZX is a re-styled version of the 280 ZX with a faster, more powerful V-6 engine.

To reach the 300 ZX target, Nissan's broadcast schedule includes news and sport programing on network tv, spot tv and cable. The 300 ZX magazine schedule includes special interest vertical magazines as well as buff books.

The 200 ZX, a sporty compact that competes head-to-head with the Toyota Cellica and the Ford Mustang, is targeted to males with household incomes of $30,000 and is advertised in a way that is similar to the 300 ZX.

Continuing Nissan's efforts to change its name from Datsun, the company changed its advertising theme for the first time in six years through its agency, William Esty. The "Datsun. We are Driven" theme is being replaced with "Come alive. Come and drive. Major motion from Nissan."

Toyota

To broaden the Corolla's market, Toyota is now offering both front and rear-wheel versions of the car.

The front-wheel drive model is considered a family-oriented car while the rear-wheel drive is targeted to more active sports and outdoor enthusiasts.

Advertised on network tv as well as in newsweeklies and consumer magazines, the Corolla's tagline is "It takes a lot of guts to redesign one of the world's most popular cars."

Also new for 1984 is Toyota's Van Wagon. Considered a lifestyle vehicle, the Van Wagon can seat up to seven people and has a removable second row of seats than can also be rolled down into a bed. Options include twin sunroofs, dual air conditioning and an ice maker/cooler.

BEFORE AND AFTER: The cooler for the Toyota Van in waiting and in use, fits the image of the driver who likes to sip while he moves smoothly along the highway.

According to Joseph Corey, Toyota advertising programs manager, media, "The Van Wagon is expected to be a popular item everywhere, especially in California."

The Van Wagon is being launched in both broadcast and in print with four-page gatefolds in newsweeklies, consumer, scientific and special interest vertical magazines.

The broadcast schedule for the Van Wagon includes NFL sports buys on CBS including the Super and College Bowls as well as buys on WTBS, CNN and USA.

Corey explains that Toyota's broadcast buying habits have changed significantly this year. "Instead of buying a very expensive prime time schedule, we're more interested in mini-series adjacencies as well as exclusivity spot buys," he says.

In addition to redesigned versions of the Corolla and Van Wagon, Toyota is offering an all new truck lineup targeted to males 20-39 with household incomes of $25,000 plus.

Volkswagen

In an effort to reverse declining sales, "now is the time to advertise heavily," says manager of Volkswagen advertising, Mike Howe.

He notes that VW's fourth quarter ad budget is up substantially over last year's totals.

The cars receiving the biggest media push are the Jetta, Rabbit, Quantum and the GTI, a sporty performance version of the Rabbit geared to younger, first time Volkswagen purchasers.

A common thread that runs throughout VW's ads that its cars are of German heritage, durable and fun to drive.

"German heritage is being stressed to get the quality ruboff associated with German engineering technology," says Howe.

Roughly 60% of VW's overall advertising expenditures are in network and spot tv and 40% in print.

Having cut production costs significantly, produced more efficient plants and designed cars that reflect the latest developments in styling and technology, domestic automakers can certainly be given a tremendous amount of credit for their efforts to win back a large chunk of the U.S. car market lost to the imports.

However, whether Detroit will be able to convince the American public that it can produce the quality cars they're looking for is yet to be seen.

As imports continue to make new inroads in the U.S., both in the sales of fuel efficient compacts as well as upscale luxury cars, their market share has nearly doubled from 15.2 in 1970 to 27.8 in 1982.

In addition to Detroit's efforts to regain market share, much will depend on the industry's momentum to not only be as good as Japan, but even better.

Madeleine Dreyfack

Coffee and tea cup runneth under

Diet Colas and fruit juices seem to be in. The coffee and tea industry is continuing to experience a slight decline. Here is what the companies are doing to improve the picture.

America's coffee cup has been growing smaller in the past 20 years.

What was once the traditional get-started beverage for the morning has found its share of the day diminishing.

The decline in coffee consumption since the 1960's coincided with the maturing of the 1960's generation. Among people in their 20's consumption has slipped from 3.4 cups a day 20 years ago, to 1.3 cups today. On average, Americans consumed 40.1 gallons of coffee per capita in 1982.

To some extent, coffee advertisers

contributed to the problem of reduced consumption with copy that implied brewing a good cup of coffee is a chancy proposition, even though a new generation of coffee makers has made the brewing process amazingly simple.

Caffeine is another factor that polarized public opinion about coffee, as decaffeinated coffee ads imply non-decaffeinated coffee induces shakey nerves and a jangled mind. The development of decaffeinated soft drinks has added fuel to that controversy.

Another element in declining consumption is a perceived change in lifestyles. Soft drinks and non-distilled alcoholic beverage advertising incorporated the values of the younger generation in use situation portrayals while coffee ads remained glued in concept to traditional middle class values.

Over the past two decades, coffee has become less and less hip.

Price has also taken its toll of the coffee market. Economic instability in Brazil and other coffee producing nations pushed the price of beans up astronomically, while coffee growers tried to control the crop to avoid disasterous surpluses. The 10¢ cup of coffee has gone the way of the 5¢ cigar.

This year, some action is being taken to reverse the pattern. The International Coffee Organization and the National Coffee Association have pooled their resources to initiate and launch a $20 million campaign designed to restore public confidence in coffee, and plug its use into contemporary life-style and work values.

Created by Advertising to Women, the campaign uses celebrities to show how they use coffee to enhance their lives. As comedienne Jane Curtin prepares to go on camera, Cicely Tyson rehearses a stage slap and quarterback Ken Anderson diagrams a play, the voice-over declares, "You are the new American society, the movers and the shakers. You are the new coffee generation. Join the coffee achievers." So much for repositioning.

The campaign runs nearly to the end of 1984 in network prime and daytime television.

The question is whether this campaign, in conjunction with the $200 million coffee marketers spend on their own brands, can reverse the trend away from coffee and the general suspicion about possible adverse effects of caffeine.

Other trends affecting coffee consumption at home include dining out, and at work coffee breaks. Restaurant consumption doesn't help build the consumer marketplace for either ground or instant, nor do take-out sales.

But media expenditures for a shrinking category certainly haven't been declining. Last year, the coffee and tea category accounted for $237 million in advertising, over $200 million for coffee, up $11 million over 1981.

But first quarter expenditures this year suggest the total spending on the coffee-tea category may be on the way down. The total fell from $50.4 million in 1982 to $43.6 million. In that quarter, network tv spending dropped $4.5 million while magazine expenditures climbed $600,000.

Contributions from major coffee marketers (except Procter & Gamble) to the generic coffee campaign may have crimped their individual budgets.

Recent trends in coffee consumption show sales were off one percent in 1982 from the previous year. Ground coffee staged a slight comeback and has been gradually taking sales away from instant coffee. In 1982, according to A. C. Nielsen data, ground coffee sales totaled 1.09 billion pounds, and

Leading advertisers' dollars by media

Coffee	Mags	Supps	Net tv	Spot tv	Net radio	Outdoor	Newspaper	Spot radio	Total
Hills Bros. (Coper sugar)				$ 5,040.7			$ 247.1		$ 5,287.8
Brim (General Foods)	$ 383.9	$227.6	$13,732.9	4,071.2			97.5	$ 225.4	18,738.5
International Instant (GF)	1,957.7		8,325.0	2,000.3			51.7		29,954.0
Maxwell House (GF)	2,772.5	815.3	31,952.9	13,731.4	$4,470.2		1,187.9	2,292.4	57,222.6
Maxim (GF)				5,644.8			36.0		5,680.8
Sanka (GF)	920.4	218.0	21,413.5	4,592.3	1,879.7		655.4	142.1	29,821.4
MJG	91.2		273.4	1,665.7			281.5	2.8	2,319.6
Nescafe (Nestle)				2,925.8			670.0	3.7	3,599.7
Taster's Choice (Nestle)	33.8		17,575.2	2,616.5			1,112.9		21,338.4
Folgers (P&G)			16,595.3	10,778.7			145.0	132.3	27,651.3
High Point (P&G)			9,475.5	2,785.1			178.2		12,438.8
Tea									
Lipton (Lever)	3,351.6	1.4	5,585.8	5,334.1		$65.3	319	13.7	14,670.9
Nestea (Nestle)			7,196.9	2,879.1			193.5	81.9	10,351.4
Bigelow	854			42.2			80.1		976.8
Tetley (Allied Young)				466.1			207.4		673.5
Celestial Seasonings	652.4								652.4

General Foods' International Coffees, ranging in flavor from Irish Mocha Mist to Viennese, tend to be consumed as a substitute for a sweet snack.

Lipton is the largest advertiser in the tea category, venturing into all media except network radio in 1982, with creative based on the celeb presenter.

instant, 670 million pounds. But contradictory data from the National Coffee Assn. shows ground coffee sales are down.

The consumer marketplace is dominated by three package good companies: General Foods, Nestle and Procter & Gamble. General Foods has six brands on the supermarket shelves, Brim, International Instant, Maxwell House, Mellow Roast, Sanka and Yuban; Nestle has three, Nescafe, Sunrise and Taster's Choice. Procter & Gamble entered the market over a decade ago with the purchase of Folgers, and added one brand of its own creation, High Point.

General Foods is the biggest spender of the lot, investing over $100 million in Leading National Advertisers six measured media, as compared with about $50 million for Procter & Gamble, and $35 million for Nestle.

As an industry, coffee has maintained a steady sales to advertising in the four cents per sales dollar range, standing at 4.0 in 1980, 4.5 in 1982, and 4.2 in 1983, according to Nielsen.

General Foods

The biggest mass marketer of coffee, General Foods spends at a rate that more than doubles what its major competition invests. And as can be expected, most of that money is spent in network and spot television.

But in addition to being the dominant media spender, General Foods is the most diversified spender as well. Last year GF spent over $6 million for its coffee products in magazines, $2.7 million in spot radio, and $6.2 million in network radio. These are small amounts in comparison to what is spent in television, but large in comparison to what other coffee marketers are spending in magazines and radio.

General Foods tends to segment the market by age group and life style. Maxwell House is GF's most main stream product, according to Stephen Morris, vp, general manager, Maxwell House division. Radio is used to reach a younger segment as well as to supplement the basic television buy.

Creative for Maxwell House was recently changed to a softer sell approach, featuring a photographer and his dog. The strategy has remained consistent, but an effort is being made to reach a broader demographic than in the past. In media, contemporary format stations are being added to the previous radio market buy.

Sanka, GF's long term decaffeinated brand, is positioned mainly against older coffee drinkers. Print, used to supplement tv, reaches the older target demographic with such magazines as *Modern Maturity*.

Brim, the other decaffeinated brand, is positioned against a younger demographic.

GF's International flavored coffees skew younger, and tend to be used as a substitute for a sweet snack and are in a different consumption frame than other forms of coffee.

Morris' view of the current coffee market is optimistic. Consumer attitudes are positive, partially due to price drops. He also sees an upsurge for ground coffees, as popular taste is shifting away from convenience products and back toward flavor. He also

GROUND COFFEE

Base: Female homemakers (76,631,000)

	All			Share of users	Share of Volume	Volume/ users Index
	000	%	Unwgt			
Total used in last 6 months	47671	62.2	6071			
Brands:						
A&P 8 O'Clock (Regular)	1876	2.4	247	2.4	2.7	113
A&P 8'Clock (Decaffeinated)	319	.4	46	.4	.2	50
Other A&P (Regular)	232	.3	25	.3	.1	33
Other A&P (Decaffeinated)	173	.2	22	.2	.2	100
Brim	4936	6.4	692	6.3	5.0	79
Brown Gold	178	.2	32	.2	.2	100
Butternut	1313	1.7	137	1.7	2.0	118
Chase & Sanborn	1053	1.4	133	1.3	.6	46
Chock Full O'Nuts (Regular)	2946	3.8	452	3.7	3.3	89
Chock Full O'Nuts (Decaff.)	475	.6	80	.6	.4	67
Edwards	629	.8	81	.8	.9	113
Folgers Flaked	6907	9.0	776	8.8	8.7	99
Folgers (Vacuum)	10812	14.1	1272	13.7	16.7	122
Happy Medium	16	—	2	—	—	—
High Point	1641	2.1	169	2.1	1.0	48
High Yield	321	.4	52	.4	.4	100
Hills Bros. (Regular)	4915	6.4	735	6.2	6.4	103
Hills Bros. (Decaffeinated)	843	1.1	117	1.1	1.3	118
Luzianne	575	.8	60	.7	.5	71
Manor House (Regular)	215	.3	49	.3	.2	67
Manor House (Decaffeinated)	59	.1	12	.1	—	—
Martinson	872	1.1	132	1.1	.8	73
Maryland Club	749	1.0	71	.9	.6	67
Max-Pax	234	.3	24	.3	.1	33
Maxwell House ADC	8973	11.7	1190	11.4	12.6	111
Other Maxwell House	8436	11.0	1034	10.7	10.8	101
Medaglia D'Oro	292	.4	63	.4	.2	50
Melitta (Regular)	220	.3	35	.3	.1	33
Mellow Roast	540	.7	64	.7	.6	86
Mr. Automatic	158	.2	22	.2	.2	100
MJB	1732	2.3	210	2.2	2.5	114
Sabro (Regular)	8	—	1	—	—	—
Sabro (Decaffeinated)	52	.1	10	.1	.1	100
Sanka	6622	8.6	860	8.4	6.4	76
Savarin (Regular)	891	1.2	144	1.1	.9	82
Savarin (Decaffeinated)	219	.3	39	.3	.3	100
Stewarts (Regular)	121	.2	23	.2	.1	50
Stewarts (Decaffeinated)	37	—	12	—	—	—
Generic (No label)	819	1.1	102	1.0	1.0	100
Store's own brand	2916	3.8	367	3.7	5.1	138
Maxwell House Master Blend	5605	7.3	338			
Other	3305	4.3	447	4.2	5.9	140

Source: Mediamark Research Inc., Spring 1983

sees a strong opportunity for new products because attitudes toward coffee are more positive and the current tenor of advertising is to present coffee and its preparation in a more positive frame. "The feeling about the climate for coffee products is as good as it's been in a long time," Morris said.

The strongest growth segment in the industry at present, Morris said, is ground decaffeinated coffee.

Procter & Gamble

With two coffee brands, Folgers and High Point, P&G is the weakest of the big three in the coffee business, but in the long run, may prove to be the most formidable.

Most of the $40 million that P&G spends in media on these two brands goes into television. Less than a million nationally goes into newspapers, but the package foods giant does employ free standing inserts to deliver its message and cents-off coupons in print.

For the Folgers brand, P&G continues to use Mrs. Olson, who dispenses motherly advice about the virtues of being able to brew a good cup of coffee. Copy points for the brand, according to a P&G spokesman, are flavor and aroma.

The theme is being embellished this

year, as coffee is introduced into a cooking setting in the kitchen, once again, with Mrs. Olsen dispensing her sage advice. But P&G also has a recently released commercial in that cooking setting without Mrs. Olsen.

In a regional move, restricted to the southeast, P&G is introducing a new vacuum-packed bag package of ground coffee. Advertising for this improvement on the traditional paper bag, stresses the features of freshness, convenience and price. The bagged version sells for about 10¢ less at the retail level. There are no present plans to bring the bagged version north or west.

P&G's other brand, High Point, available nationally in instant form, is now in test in ground form in a limited number of markets. Lauren Bacall continues to be the spokesperson/presenter for the brand, stressing the copy points of aroma and flavor.

Next month, P&G rolls out a food service version of High Point to challenge General Foods pre-eminence in this section of the market. Contrary to expectations, P&G is using magazines in the November introduction with a schedule that includes *Readers' Digest, People* and *Modern Maturity*, plus food service trade publications.

Tea

Tea, like coffee, has been contending with a weakening sales picture in the past decade, as total consumption remains in the area of 155 million pounds annually. Since 1977, pounds sold are down three percent. Retail sales dollars, on the other hand, are up 23% to $803 million.

The sales loss is attributed to a weakening of the ice tea mix segment, instant and packaged tea, which was not compensated for by increased tea bag sales.

Currently, tea bags account for 58% of sales, instant tea, 21.1%, iced tea mix, 16.6%, and loose tea, 4.3%.

Advertising for tea fell to its lowest levels in this decade last year, as marketers invested $17.8 million, according to the National Tea Association, as compared with $20.5 million in 1981, and $21.4 million in 1980. The advertising to sales ratio last year came to 2.2¢ on the dollar, as compared to 2.8¢ in 1980, according to U.S. Tea Association data.

Major brands in the tea market, from the advertising point of view, are Lipton, spending $14.7 million, and Nestle, with $10.4 million. Lesser brands, such as Bigelow, Tetley and Celestial Seasonings, come in with less than $1 million in measured media.

A growing factor in the overall tea market is the gradual growth in herbal, no-caffeine teas. This area was pioneered by Celestial Seasonings, which has been able to move from health food stores to win shelf space in many supermarkets. The major producers, seeing there is a market, albeit small, have added their own lines, among them Lipton and Bigelow.

Growth in the tea market is seen by most observers as unlikely in the near future. But the development of a desorbate process, held by Procter & Gamble, suggests there is hope of improving instant tea flavor, which could add sales to that segment.

But despite a flat market, Procter & Gamble and Nestle are entering the brewed tea field, P&G with its purchase of Tenderleaf, and Nestle with its first teabag product.

Lipton

Advertising of teas is dominated by the Thomas J. Lipton Co. which last year spent more than half of the total for the entire tea category. With $14.7 million, Lipton laid down the biggest tea umbrella, although the brand was outspent in network television by Nestle's Nestea.

Lipton is a multi-media advertiser. In 1982, the brand's creative was seen or heard in all media save for network radio.

Lipton's use of television split funds nearly evenly between network and spot tv, where nearly $11 million was invested. Creative for Lipton regular teas featured ex-football star and sportscaster Don Meredith in a variety of poolside and courtside settings, where dandy Don relaxed with his glass of iced tea before being recognized by a celebrity hunter.

Tennis star Chris Evert Lloyd is the presenter for convenience teas, shown drinking ice tea between action shorts of serves and returns.

Gerry Boycks, vp-marketing for Lipton, said the two present the essential quality story for the brand.

Nielsen market share for coffee industry —

De-caf is 17% of the total market

GROUND (64% of total)

Maxwell House regular	24%
Folger's	24%
Private labels	15%
Brim	4%
Sanka	3%
Yuban	2%

The remaining 28% is divided among regional brands, Savarin, Hills Bros., Martinson.

Total General Foods = 34%

INSTANT (36% of total)

Maxwell House	22-23%
Folger's	12%
Sanka	10%
Taster's Choice	9.5%
Nescafe	6%
Taster's Choice decaf	6%
Nescafe decaf	2%
High Point decaf	5%

Total General Foods = 43%
Total Nestle = 24%
Total Folger's = 17%

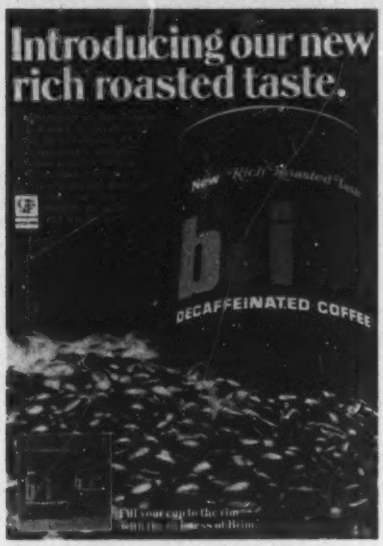
Boycks is also enthusiastic about the herbal aspect of the tea business. "That market was very small at first, but since we got into it after it was opened by Celestial Seasonings, it has done very well. I'm sure Celestial Seasonings is glad to see us in there with them. But the future of herbals is unknown at the moment in the U.S.

"In Europe, herbals constitute 50% of the business, but that's partially because there is hardly any iced tea served. It was just introduced into Switzerland last year."

In the U.S. Boycks estimates that 80% of the tea consumed in the U.S. is iced, and 20% hot. "That's a transition coffee never had before, from hot to cold, but tea has made it very well," he noted.

Nestle

Nestle, better known for its various soluble coffees, is also a large factor in the tea market with its Nestea. This brand occupies second place in media spending, and last year put $10.3 million behind the brand in its various forms.



General Foods' Brim skews to a young, health conscious audience, while Sanka remains the mainstream alternative.

Most of that advertising was in television, $7.1 million in network tv, and $2.9 million in spot television. Newspapers and spot radio were used very sparingly.

This year, network and spot tv were used exclusively, with no print. The reason in addition to the efficiency of the medium was belief at the company and agency that the tv concept for 1983 was "worth putting all our money into."

This year's Nestea campaign focused creatively on water fun at the pool, with Nestea as the chosen beverage for fun and refreshment. It has been described by personnel at J. Walter Thompson as being "very much like a soft drink commercial, but with more humor."

Commercials for Nestea run mostly in second and third quarter, with some token activity in fourth and first quarters.

Meanwhile, Nestle is keeping its first venture into brewed tea under wraps. Tests for the brand's first tea bags are being conducted in several markets, with television and print support.

Nestle is awaiting results before deciding whether to run the new teabag line nationally.

Tenderleaf

This now barely noticed brand bears watching since Procter & Gamble purchased it from Nabisco in November 1982. As usual, P&G is moving slowly with it, and at this point, barely creating a stir.

The brand has been available of late, only in Pennsylvania and Ohio, and will probably stay there for a while.

However, P&G has redesigned the packaging for the brand while leaving the product formula alone. This fall in Cleveland television and newspapers will be used to stress new packaging and a new double chamber bag.

P&G doesn't discuss long term trends for brands, but observers of the company can rest assured that the usual careful testing will be continued before Tenderleaf is moved into an expanded market.

Celestial Seasonings

This adventurous young company created a new tea category a few years ago, and much to the surprise of the industry, Celestial estimates that herbals now account for between 10 to 12% of the market, and are the fastest growing segment of the tea business. Herbal tea sales expanded 100% in 1982, and thus far in 1983, another 35%.

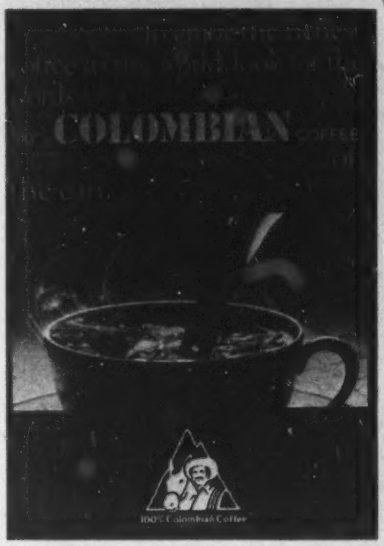
"Herb tea is the fastest growing category among all dry groceries, representing 10 to 12% of total tea consumption — Rick Sterling, marketing director, Celestial Seasonings."

Celestial Seasonings credits much of the category expansion to the entry of Lipton into the market, with solid advertising support of its herbal products. The Lipton name legitimized the category while temporarily costing Celestial some market share. But Lipton's campaign is credited with bringing in new users.

Currently, Celestial holds 46% of the market, Lipton 27%, Bigelow 12% and Magic Mountain 10%.

Target audience for Celestial is upscale, college educated.

Last year, Celestial spent a budget of $650,000 in magazines. But in 1983, Celestial is experimenting with other media to gain awareness faster, finding that print is better suited to maintenance rather than generating awareness. Spot tv has been added to the mix, while the magazine list includes women's service books, *Ms.*, *Self* and health-oriented publications.



The National Federation of Coffee Growers of Colombia tout their flavorful product, although Brazil continues to be the largest coffee-producing nation.

Conclusions

The issue of caffeine, which is now haunting the soft drink industry, has apparently subsided from controversy to choice for the coffee and tea business. Coffee has confronted the issue with decaffeinated brands and tea is just now addressing it, with herbal teas and decaffeinated regular teas.

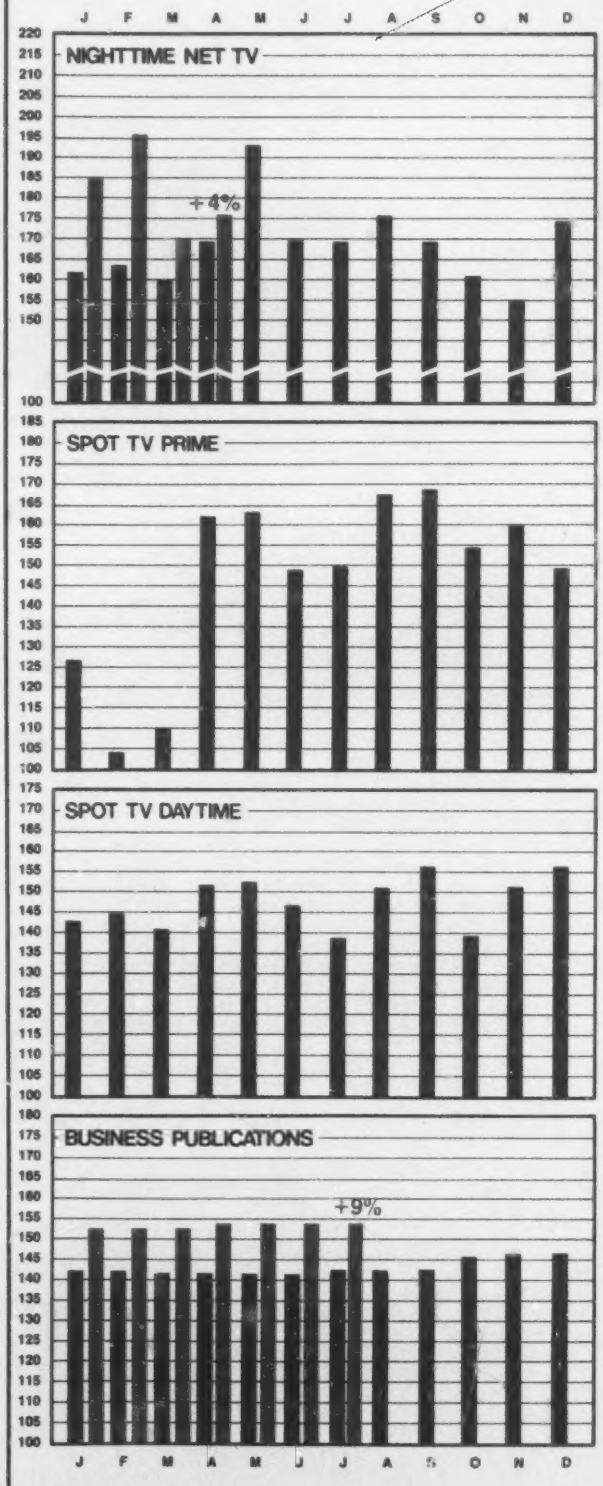
After 20 years of declining consumption, coffee has apparently bottomed out, and with the new generic campaign coming in with effective weight, could position coffee as a more contemporary beverage than has been thought of as in the recent past.

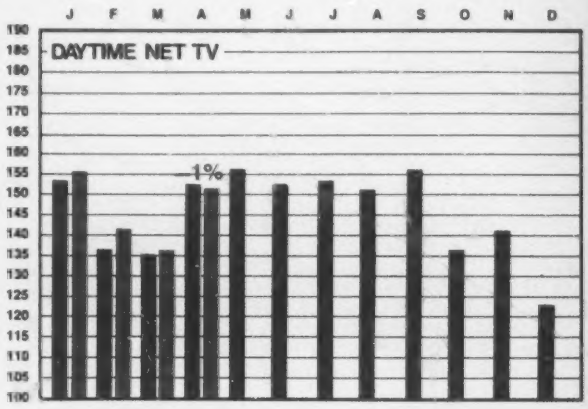
A resurgence in popularity for ground coffee, freshly brewed, is being sensed by coffee marketers, while the convenience of instant coffee, with its flavor deficiencies, looks less attractive to the general public.

Advertising budgets last year didn't increase at the same rate as media inflation, in both coffee and tea categories. Undoubtedly, advertising to sales ratios are being rethought, and budgets will follow sales curves to a greater degree than they have in previous years, when the industry attempted to overcome declining use patterns with increased advertising.

MEDIA COST INDEX

Black bars index for 1982; color bars 1983; base year 1977





The Cost Index shows comparative data for nighttime network and daytime tv, magazines, newspapers, supps, network radio and outdoor posters. Data for spot prime tv, spot daytime and radio are still unavailable.

Nighttime network tv leveled out further in April, and continued to soften in May (not shown) as the market further softened in the second quarter. Daytime network tv returned from earlier softness with a three percent gain over May in 1982.

Consumer magazines remained on a plateau in May with a continued six percent increase over the same month in 1982.

Daily newspapers also held constant with a 10% increase over April and May in 1982. National supplements built on a strong performance early in the year to post a 13% increase over the previous year.

Outdoor posters were also consistent in their pricing, holding the 10% gain picked up in the previous month.

Network radio, after an exceptionally strong first two months, trailed off to 4% gains in the start of the second quarter.

The Media Cost Index reflects trends extracted from available sources. This analysis uses standard competitive report sources to develop comparable costs that reflect monthly cost trends by medium. Where industry competitive sources are unavailable, selected cost data from SRDS are sampled.

Sources: **Nighttime Network TV** — Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service. **Daytime Network TV** — Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service. **Network Radio** — Cost per average 30-second radio announcement from BAR's Network Radio Service. **Spot TV — prime and daytime** — Cost per 30-second spot, Monday-Sunday from BAR's Spot TV Service.

Consumer Magazine estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn. **National supplements** estimate based on published (rate cards) costs of a page, four-color for the national supplements. **Daily Newspapers** estimate based on Newspaper Advertising Bureau report of SRDS costs per agate line of a sample of 788 newspapers weighted to represent the universe. **Business Publications** estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications. **Outdoor Posters** based on estimate prepared by Institute of Outdoor Advertising. Spot Radio data to develop a continuing index are not available at the present.

How to read: Media Cost Index reflects latest available costs compared with base year 1977. Percent change shows rate of change from the same month in previous year.

MEDIA COST INDEX (continued)

Black bars index for 1982; color bars 1983; base year 1977